

This document is produced by Leaseholder Support.co.uk and is a guide to key questions any Freeholder or group of lessees should consider before appointing a professional to undertake the provision of estate management services.

COMPANY INFORMATION & PROBITY

1. Please provide all relevant company details including the names and qualifications of all Directors and a list of properties if not a quoted company.

Firm/Company Name

Company Registration Number: (if a limited company)

Incorporation Date: (if a limited company)

Directors & their qualifications:

List of properties managed & area:

Data Protection Act Registration Number: (if registered)

Financial Services Authority Registration Number & Scope: (if registered)

List any professional or trade bodies to which your firm belongs: (if any)

COMPANY INFORMATION & PROBITY

Provide full details of your professional indemnity insurance (if held)

Office address(es):

2. How many years have you been in the property management business?

3. How many of your staff are involved in property management?

4. How close are your offices to our property?

IT CAPABILITIES

5. What IT facilities do you have and what information can you record and keep updated?

Networked PC's Customer Web-area Excel based accounting records Ledger & cashbook based accounting system

Accounting

Customer correspondence

On-line facilities

Telephone facilities

6. What software do you use for facilities management?

7. What software do you use to fulfil the role of Company Secretary?

SERVICE COMMITMENTS & TRAINING

8. What is your normal turnaround time for responses to:

Letters

E-mails

Phone-calls

Faxes

9. If your turnaround time is different for lessees and Directors please specify the difference:

10. Do you offer an out-of-hours service for emergencies? If so, please provide details.

11. How do you deal with complaints?

SERVICE COMMITMENTS & TRAINING

12. How can you convince us that you can offer a quality service at a fair cost?

13. How often does a representative from your company visit blocks you manage and check on how contractors you appoint fulfil their obligations?

14. What commitment to professional training do you have for your staff and your company?

15. Please advise how you keep up to date with legislative changes that concern your industry?

FINANCIAL INFORMATION

16. What type of account do you hold service charges in?

17. Will any service charges for our site be kept in a bank account just for our site?

18. Who will receive any interest from service charges you hold on our behalf?

19. Are any charges made for running a bank account for our site?

20. How many bank accounts will you administer for us at your standard fee level?

21. What payment facilities/methods do you offer lessee's for service charge payments?

22. What payment terms do you operate for contractors?

FINANCIAL INFORMATION

23. What is your fee structure for property management?

24. Will your fees carry VAT?

25. What insurance commission arrangements do you have with existing clients?

26. Please detail how you operate payroll for porters/caretakers?

27. Please detail how you deal with archive records?

NEW CLIENT INTEGRATION & BEYOND

28. Who in your firm would be responsible for new Client integration

29. What lead in time/notice would you require to set us up as a new Client?

30. What length of notice period do you require in case of termination?

31. List all those of your staff we are likely to liaise with and their qualifications

32. Please supply the following data:

(a) Number of clients you currently provide residential management services to **(b) Number of blocks the above amounts to** **(c) Number of units the above amounts to**

MAINTENANCE & REPAIRS ISSUES

33. How comprehensive a panel of contractors do you have?

34. Do you charge a fee for contractors selection and/or percentage of their charges for:

(a) Contractors chosen by you

(b) Contractors chosen by us?

35. What selection criteria do you use for contractors on your panels?

36. Please define your understanding of major works or works for which supervision would attract additional fees.

37. On what basis do you re-tender maintenance contracts?

MANAGEMENT OF THE LEASE ISSUES

38. How do you deal with unpaid service charges – what procedures are in place to deal with complaints?

39. How do you deal with lessees who are in breach of their lease?

40. What advice do you have to help deal with lessees in breach of their leases?

41. Please give details of any serious breach of covenant (other than rent) that you have dealt with within the last 18 months?

REFEREES

42. Please supply three references for blocks you manage, ideally these should be similar to our own property in the area.



Please return your completed tender form to :



EXTRA'S

Provide enclose proof of your financial & business probity.

List of enclosures:

Please enclose an example of the format of financial information you will provide for us

List of enclosures:

Please enclose any terms of business that we may need to consider in appointing your company/firm

List of enclosures:

NOTE:

An inspection of your accounts department and systems may be required prior to any final appointment.